

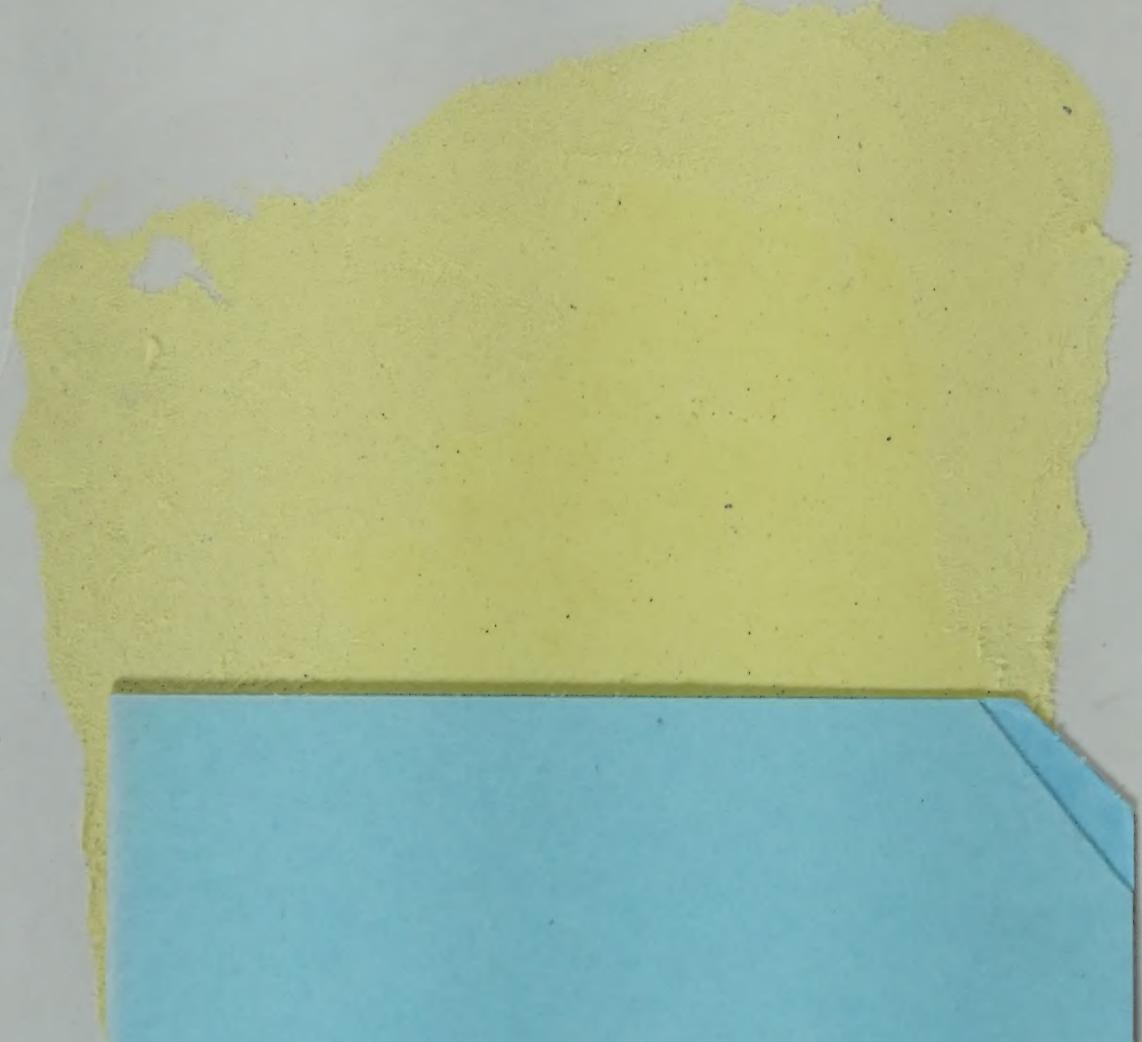
# PROJECT

PLANNING  
FORMULATION  
& EVALUATION



A MANUAL





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# PROJECT PLANNING FORMULATION AND EVALUATION

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India

## A MANUAL

by

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CARITAS INDIA

C.B.C.I. CENTRE, ASHOK PLACE,  
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PROJECT PLANNING  
COMMUNALISATION  
AND EVALUATION

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Archbishop's House  
32, Park Street  
Calcutta-16

16th April, 1979

## Message

Caritas India, the official national organisation of the Catholic Bishops' Conference of India is engaged in Relief and Development work in India.

Caritas India is attempting to decentralise its activities to work in partnership with grass-root level agencies. While streamlining procedures for maximising efficiency, the need for a Manual in Project Planning, formulation and evaluation, was felt, to assist those involved in Social Welfare and development work.

I am extremely happy to send my best wishes and blessings for the publication and hope that the document will be of immense value to Social Workers and development agents, irrespective of their affiliations and motivations.

*Lawrence Cardinal J. Picachy.*  
President — C.B.C.I. & Caritas India.

March 1863  
1863  
1863

## MEMO

1. The following is a list of the names of the men who have been appointed to the various posts in the State of Missouri, and the date of their appointment. The names of the men are arranged in alphabetical order, and the date of their appointment is given in the following order: the date of their appointment, the name of the post, the name of the man appointed, and the name of the man appointed.

## APPENDIX

APPENDIX

## AUTHOR'S NOTE

Development, a concept of change in the attitude of people and the improvement of the quality of life of people, is achieved through implementing programmes in social, economic, educational, cultural and related fields in partnership with people. It is an accepted fact that planning has to be initiated at the grass roots to be effective in development results. It is being increasingly recognised that discretion for decision making at local level enhances the chances of delivering development in appropriate doses and in meaningful ways, although it is practised hesitatingly.

Considering the fact that development viewed as the development of the 'whole man', is a product of decentralised planning and decision making, respecting the self-hood of people and involving people of all strata of society, especially those who are directly benefitted. This manual is formulated with the following objectives.

1. To assist project holders and programme implementors to use the manual as an 'information bank' for planning and formulating and later evaluating projects.
2. To guide project administration staff in studying and evaluating projects.
3. To sensitize project holders and administrators regarding the need of information and how to compile them either for formulating a project or for investigating the soundness of the programme, as well as evaluating a funded project.

An attempt is made to compile the requirements systematically as data, document, information and knowledge in planning and formulating socio-economic development programmes. However, it is not claimed that the manual is either complete or exhaustive enough to make it foolproof. The creativity, imagination, discretion and basic knowledge of users will make all the difference in its application.

The manual is based on the proforma found in chapter II and III. It covers technical, economic, managerial, organisational, administrative and other aspects of projects. The manual will have sufficient information to make an objective conclusion on projects, provided data is collected and compiled as envisaged in it.

The role of project holders and project officers in the administration of development aid through the implementation of socio-economic programmes, is primarily of catalytic agent. They can assume their role in various ways namely animators, counsellors, thinkers, planners, change agents etc. but focussing people as the subjects of change and not as objects of aid recipients. The role of people should not be appropriated to one-self, who is working as a social worker. Guidelines elaborating the above aspect of development work are also included in the manual for reference.

## HOW TO USE THE MANUAL

1. The first chapter deals with principles, practices and guidelines on planning, and development.
2. The second chapter deals with information needed for formulating a project proposal. The proforma for project formulation has thirteen headings. Under headings "technical feasibility and economic viability", informations needed for different category of projects are given separately. Hence, for example, for formulating a Dairy project, details under proforma headings (a), (b), (c), (iv) under (d), (iii) under (e) and (f), (g), (h), (i), (j), (k), (l) are to be collected and compiled.
3. The third chapter deals with evaluation of funded projects and information under the proforma heads as mentioned are to be collected and compiled.

Concluding this introductory note, I express my sincere gratitude to Caritas India for having afforded the opportunity of publishing this manual. I also express my heartfelt thanks to one and all who co-operated with me in various ways to make this publication possible. My ardent desire is that the manual is widely used for the benefit of poor and needy.

T.K. MATHEW

NEW DELHI

1-3-1979

Archbishop Henry D'Souza

Archbishop's House  
P.O. Satyanagar  
Bhubaneswar-751007

## FOREWORD

Development is the task of Caritas India. Development is understood in the Christian sense as the development of the whole man. Man is not only a material being whose living conditions have to be improved through development. He is primarily a person with a spiritual goal. However it is also true that the full development of his personality is often conditioned by his material well-being. Caritas India attempts therefore to assist man to become more human. The aim of its various projects, whether it be in housing or education, agriculture or medicine, is always to foster the growth of man towards that dignity with which God has endowed each one of us by creating us in His own image.

Poverty, ignorance, sickness forge some of the shackles to the spirit of man. But these are not inevitable Man can break these chains. It is a noble work to liberate man from them. Caritas India seeks to co-ordinate and encourage the social concern of the Church in India. In whatever way it is expressed the efforts of Caritas India are designed to give witness to the love of Christ remembering the words 'Whatever you do to the least of my brethren you do unto Me.'

In the present day complex of relief and development the planning formulation and evaluation of Projects are an important means for this work. Donor agencies require well formulated proposals in order that they may raise funds. Projects are not people but they help to reach people. This manual has been written to assist the task of planning, formulation and evaluation of projects. Mr. T.K. Mathew has had much experience in this line. He has shared his knowledge and know-how.

This manual is not meant to take away the initiative of project planners nor is it exhaustive of every possibility in the fields of development. There will be many new needs which will emerge from the grass root levels. However, many beginners have asked for guidance in project planning, formulation and evaluation. This manual attempts to meet that request.

It is hoped that this book will be used only as a guide. Field workers may have, and in fact must have, their own plans and projects emerging from concrete situations. Their initiative can only be encouraged. Innovative experiments and projects should find a place in any future edition of this manual. We can hope that the work of development of peoples will be fostered through this booklet.

H. D'Souza  
Archbishop of Cuttack-Bhubaneswar.  
Director General  
Caritas India

February 27th, 1979



*The Most Rev. Ignatius Lobo  
Bishop of Belgaum*

*Bishop's House B.C. 69  
Belgaum-590001  
Karnataka*

## **APPRECIATION**

Caritas India has grown to maturity in the last 16 years, making its contribution on behalf of the Bishops of India, in the field of socio-economic development. The Manual produced for Project Planning, Formulation and Evaluation will certainly prove to be a useful and necessary handbook for project officers, diocesan directors of Social Service Societies (Caritas), and project holders.

The Manual is the work of Mr. T.K. Mathew, who is perhaps the oldest and most experienced member of the staff. The practical guidelines clearly spelt out at every stage of a project aims finally at integrated programmes for the benefit of under-privileged communities.

I Congratulate the Executive Director, Mr. T.K. Mathew and their collaborators for the production of the Manual.

*Ignatius Lobo  
Bishop of Belgaum*

February 28, 1979



## Planning—For What And For Whom

There are different dictionary meanings for the word 'Planning'. To list some of them :

1. A formulated way of executing something.
2. Any method of thinking out acts and purposes before hand.
3. Project a plan of action.
4. Design or scheme of arrangements.

For the purpose of project planning, our definition may be the following :—

Planning is fostering the thinking of a group of people, poised for development, and synchronising their thoughts with their needs and abilities for an anticipated action, which will result in their welfare.

To give another definition :—

Planning is the blue print of action, visualising and foreseeing inherent bottle-necks in implementation as a result of the various systems operating when physical inputs, will of people and technology are harmonised for human welfare. The planning process, brings forth a set of questions, namely, the purpose, the methodology, the strategy, the beneficiaries etc. of planning along with the what, whom, who and why of planning.

### Planning for what

If planning is for development, a further question can be asked—what kind of development? In turn the nature of development, total development—integrated development, material development, social development etc. will have to be clarified. The type of development aimed at, will depend on various factors prevailing in an area in relation to the community planned to be assisted and no generalisation is feasible. Hence a clear understanding of the purpose of planning, is essential.

## Planning for whom

If the answer to the above question is 'planning for people' a further question asked is what kind of people?

1. Poor, needy, exploited, oppressed, unskilled, illiterate, ignorant etc. or
2. Middle class, skilled, educated, informed, deserving etc. or
3. Rich, exploiting, oppressing, highly skilled, well educated and powerful etc.

Here a choice has to be made as to for whom the planning is envisaged, and accordingly the planning procedures have to be delineated.

The above two questions lead to :

### a) Identification of community and need

The identification of a community and their needs are interlinked. The identification of the needs of an area demands the *identification of the community* so that the identified needs are relevant to the life situations of the community for whom the needs are identified. The choice of the community for development planning depends very much on the genuineness of the concern exercised in serving a particular community. There are very many instances where planning is done to help not necessarily the most deserving. Once the initial choice is made the tendency is to continue with them even after the mistake is realised.

The choice should be an identification of and with the oppressed and weaker sections of the society. Any other choice or a compromise will raise the issue of relevance of planning for the common man.

### b) Study of the Area

A close study of the area will help to determine the approach to planning.

The study may be related to

- i) Nature of the area—tribal—rural, urban or Rururban.
- ii) Resources of the area—natural resources which can be harnessed.
- iii) Infra-structure in the area—development less potential from an economic and social base—physical and human infrastructure.

### c) Study of the Community

The background of the community to be served, should be studied.

- i) Cultural heritage—Backward/Tribal/Harijan systems.
- ii) Social background—ostracised/alienated/segregated.

- iii) Economic system—exploitative/monopolistic/poor purchasing capacity of people.
- iv) Political, structure—affiliation of the people—conscious of people power.
- v) Moral standard—ethics of living.

Hence, a thorough knowledge/study of the area/people, is a pre-requisite before an attempt is made to identify the needs of an area and the community for planning. This calls for using available data/documents to study the area as also to compile, consolidate and diffuse information on the area so that the approach is scientific and relevant to the area and community and in conformity with the growth requirements of specific groups.

### **WHO SHOULD IDENTIFY THE NEED**

In a democratic political system such as in India, there is little room for paternalism, though it is still practised. The role of people, their participation and involvement in decision-making as a process, should be initiated from the beginning of planning. The role of the community should not be under estimated. Irrespective of the backwardness, one has to respect the potentialities. External agents can only act as accessories in the process and any attempt in taking over the role of people will only result in allowing the status quo to be maintained. The need of the area should be identified by the people themselves, for which an atmosphere could be created and opportunities offered during planning.

### **HOW TO IDENTIFY THE NEED**

Depends on the type and nature of need :

- a) Material need—to acquire the means of production—physical needs.
- b) Social need—animation/organisation/to grow as a community.

The methodology of identification of need could be through :

- a) Using the data available from the area and community and placing it before the people for a study.
- b) Dialogue—individual informal chats to formal discussions and animated discourses.
- c) Launching of Pilot action programmes :
  - i) for mobilisation of resources
  - ii) to pronounce felt need (expressed need)
- d) Studying national priorities with people.
- e) Collaboration with government and other voluntary agencies—consultations.
- f) Identification with people—not an easy task as the pattern of life will need change.

Grass-root planning is essential, with the active participation of people, to identify the need of an area, and plan accordingly for good results.

## DEVELOPMENT—PRINCIPLES AND PRACTICES

Development, may be defined as a conscious effort of a specific community to achieve total welfare. For this the community members should co-operate and plan their future. Evolving and application of relevant techniques are important aspects of this process.

The above definition, pre-suppose and result in identifying

- a) An area
- b) A community
- c) Techniques accepted by people
- d) Strategy implemented by people
- e) Positive results achieved by the community as a whole.

The principles and techniques of development emphasize the providing of opportunities for collective action and exercising of co-responsibility.

Development practices recognise the potential in each individual irrespective of their status and help to achieve the dignity of human person in society.

Development generates a learning process, acquires and transmits skills in decision making, community participation, self-help, self-reliance, self-determination, problem solving and taking up of collective responsibility.

Development is basically democratic in its structure and leads to the discovery and nurturing of local leadership and establishment of human infra-structure for asserting self-hood of people.

Development is universal in its approach and no sector of activity is outside its scope. All activities leading to build up the total personality of an individual is the end result of development.

True Development considers both the means employed and the end pursued equally important. While the ends may offer motivation, the means will determine the quality of life achieved as a result of the processes evolved during developmental activity. Hence process goals are relatively more important than task goals.

### **A ten-point technique to Development**

The techniques mentioned are from the point of view of a social animator who is an outside agent. The objectives to a large extent will

guide the evolving of techniques. The end results of development are to be valued more in qualitative achievements than quantitative physical improvements. The techniques found useful are :

**1. Commitment to a 'People's approach'**

Development of the people, by the people, for the people should become a reality in the community. Ensure involvement of people at grass-roots and let the community be subjects of the programme and not objects to accept forced regulation.

**2. Attempt to evolve a self-reliant economy**

Planning through education, animation and awareness building should lead to self-help activities and promotion of self-reliance. Mobilisation of local resources in men, material and money, however limited it may be, will be an acid test. Opportunities evolved in the above spheres will help to gauge the motivation and commitment of people.

**3. Promote the creation of grass root structures**

The identification of a community through its own structures created by them need be encouraged. The role assignment as well as participatory involvement in decision making become a reality if the people form part of the structure established for development.

**4. Set in a learning process**

Through the process of conscientisation (awareness building) an analysis of the situation in which the community is placed will evolve a self-educating programme. It may instill hopes and aspirations and even lead to develop a spirit for confrontation. But an unbiased and balanced approach to reality will build proper awareness and the learning process will be continued.

**5. Offer short term tasks for immediate action and long term targets for improving quality of life**

An increase in production, an improvement in employment opportunities or similar short term benefits would motivate one for active involvement. The long term objectives of liberation from exploitation and contributing to the establishment of a just order in society can be differentiated and tackled at a different level.

**6. Launch simple programmes, graduate to complex and end up with integrated projects**

It is desirable to begin simple programmes manageable by people and in which they can participate. Various interests in the community be considered and efforts made not to divide the community. Integrated and complex proposals beyond the capacity of ordinary people will prevent them from being subjects of the project.

**7. Provide opportunity for Interaction**

Possibilities of communities interacting with similar or dissimilar groups would create an understanding and awareness of problems, and

to find solutions. Mutual collaboration and understanding will boost the morale of both groups.

#### **8. Maintain the animatorship**

A social worker can easily become paternalistic, demanding and imposing. The role of animatorship should be maintained to avoid the overdependence of the community on external leadership. The community should be encouraged to manage their own affairs and shape their own destiny so that the growth is natural and under the local leadership.

#### **9. Identify with the community**

It is essential that glaring differences in the standard of life between the animator and the community be avoided. To become part of the community, the social worker may have to simplify his/her life styles. The trust and confidence of the community is essential for the efficient functioning.

#### **10. Tackle issues relating to rights after sufficient ground preparation.**

Pre-mature or pre-emptive attempts for confrontation in fighting root causes of exploitation and oppression could result in frustration. Hence a stage by stage application of a strategy conducive and palatable to the differing situations would ultimately pay dividends in changing or containing unjust structures. It would require the building up of a large net work. Isolated efforts are usually nipped in the bud.

To conclude, the challenge of development is the liberation of oppressed from unjust and exploitative system to establish a new social order.

### **GUIDELINES FO PROJECT HOLDERS/IMPLEMENTORS**

Projects and programmes are a means to an end and not an end in itself. Hence projects and programmes are utilised as a medium for achieving development. The cardinal principles and philosophy behind the organisation of people could result in making the project/programme.

1. A medium for educative growth of the community.
2. An occasion to mobilise self-help and promote self-reliance.
3. An investment with constructive long term targets and goals.
4. An opportunity to develop appropriate attitudes and clear motivation.
5. A tool to achieve cumulative progress.

6. A process to develop mutual concern and solidarity.
7. An ability to cultivate a sense of proportion and better moral/social behaviour.

The project organisation can be divided into :—

- a) Orientation
- b) Formulation
- c) Implementation and supervision
- d) Evaluation

#### A. Orientation

In planning a project the following preliminary demands need be met.

1. **Orientation** — an understanding
- a) **Of the self** — The project holder could make a self assessment of ones capabilities and to find ways and means of improving them.

The following may be useful:

- i) An intimate knowledge of people to be helped.
- ii) People's acceptability of the project holder.
- iii) Limitations of time, competence, leadership etc.

#### b) **Of the people**

- i) A short socio-economic survey would reveal many facts relating to the people and the data can be used as a basis (Bench mark) for measuring progress/improvement/results after implementing the project.
- ii) Attitude of people—fatalism, defeatism, pessimism and related attitude if known will help evolve the right strategy for development.

#### c) **Of the external forces**

An understanding of the unjust systems (middlemen, money lenders) and monopoly interests will help a long way in avoiding possible confrontation or planning for confrontation appropriately.

#### d) **Involvement and Participation of People**

Having oriented oneself in felt need, social habits, attitudes and outlook as well as motivation of people and the external forces at work shaping the destiny of people, involving of people, from the very beginning of the planning of a project is a must. To achieve this, formal and informal dialogues can be initiated. Role playing as individuals and as committees can be influenced. A variety of tasks can be got done by the beneficiary families without neglecting the efficiency of the project. The decision making process for the following can be the areas of involvement.

- a) Collection of data
- b) Feasibility study

- c) Costing of project
- d) Developing collaboration with others
- e) Preparing criteria for the selection of beneficiaries
- f) Collection, custody and administration of local resources.

**No planning is effective without people's participation**

### **B. Formulation**

The art of formulation of projects after sound planning provide the blue print of action and will foresee possible problems to work out solutions. Considerable amount of data and statistics would be needed for proper formulation. Guidance for the same is included in the test of the manual. While formulating a project the following factors are to be taken into consideration.

- a) Skills and competence of the people.
- b) Local natural resources which can be harnessed.
- c) Availability of infra-structure for development.
- d) Government aid, subsidy and grants.
- e) Possibility of collaboration with others.

The formulated project should provide, the background of area and people, technical feasibility, economic viability of the project, the administration and management potential, the beneficiary pattern, cost plan as well as continuity of the project, as important elements.

### **C. Implementation and Supervision**

The acid test of correct planning and formulation will be revealed at the time of implementation. The democratic norms, people approach, self-less leadership, efficiency of operations, unexpected pressures from external quarters etc. will reflect in implementation. Recording of events, accounting of expenditures, periodic reporting on progress etc. are very important to understand and measure the progress achieved.

### **D. Evaluation**

It is desirable that projects are evaluated at periodic intervals. To make the evaluation objective and constructive, it is preferable that an outside person or agency is asked to conduct the evaluation. The objective of the evaluation should be clear and the results of evaluation should be revealing the strength and weakness of the project. Emphasis need be given to study the educative aspects achieved and effects of people's participation, apart from physical achievements.

## **ROLE AND FUNCTION OF PROJECT OFFICERS**

### **An Ambassador**

The project officer functions as an Ambassador of the agency which he serves at the regional/local level. Meaningful Public Relations, diplomatic behaviour, and shrewd exchange will help to build up the image of and good-will for the agency.

### **Service Oriented function**

The poise and approach should appear less official and bureaucratic. An attitude of helpfulness, understanding and an urge for service need be projected. Availability for discussion, consultation and down to earth approach to service would win recognition and appreciation.

### **Animator, educator in role**

A project officer fits in well as an animator with project holders, as a counsellor between project holders and beneficiaries, and a change agent among the community as a whole.

### **Creative thinker and constructive planner**

An indelible impression is created in the minds of project holders and beneficiaries when the project officer possesses the qualities of instant instructive capacity, originality in thinking, spontaneous situation analysis, and understanding of peculiar situations. The above abilities will develop greater rapport with people and will enable continued dialogue for better development efforts.

### **A positive and promotive approach**

To be negative may be defeating. A positive, promotive and constructive approach without bias to any sector will be an asset. Such an approach will enable the introduction of desirable changes in the attitude of people. The work should envision a promotional pattern in the education, animation and conscientisation of communities, so that Project holders could become the bridge for effective delivery of development to community. In short, the role and function of a project officer is crucial within the limitation one is set in. However, to be effective, efficient and popular one has to be of quick wit, diplomatic, objective but subtle to vulnerable situations and capable of palatable interpretation of situations.

## PROCEDURAL MATTERS FOR THE GUIDANCE OF PROJECT OFFICERS

1. It is advisable to have an understanding of
  - a) the approximate load of work ;
  - b) the geography of the place of work;
  - c) the methodology of operation;
  - d) the data on pending work in the form of a ready reckoner.

A study of the area, to be covered from the point of view of geography, feasibility of approach (transport system) etc. is a good initiative.

The area could be divided into regions or zones taking into account the accessibility. A monthly chart showing the pending work on one sheet under each zone/region within a region will be a ready reckoner for planning visits and assessing the quantum of pending work for visits.

Maintaining the above charts on a monthly basis by scoring out those on which action is taken will at any point render an account of the pending work and the work accomplished.

- II. a) It is advisable that tour programmes are planned sufficiently in advance using the above chart but providing for addition of projects which are received prior to the travel.
- b) Project sites may be visited with the concurrence of the project holder in advance. Intimation on the need of meeting the beneficiary group may be made when the visit is announced so as to provide sufficient time for the project holder to inform the group and make arrangements for the meeting.
- c) The preliminary study of the project (in the file) along with the prima facia study comments of the Head Office, should render the framing of the pattern for the study, develop the type of queries and requisition for the kind of documentations and additional clarifications not available in the application received. However, it should be kept in mind that balance be maintained while soliciting data and statistics and when queries raised as well as issues investigated, taking into account the nature, content and size of the proposal.

III      The on-the-spot study/evaluation should not become a mere exercise of verification of facts. The data, statistics or documents should be used for an objective analysis of the situation.

This will help to make an assessment of the need of the group, their abilities, and liabilities, potentialities and impediments, strengths and weaknesses etc. The data and an in-depth study should yield promotional and organisational aspects of the beneficiaries.

An attempt to initiate dialogue between project holder and community on the one hand and between the members of the community among themselves on the other hand could be attempted at the time of study, if the measures to involve people are already not initiated. Possibilities of talking, holding discussions with the groups should be taken advantage of not only to brief but also to obtain the real feed back on 'felt needs', organisational involvement etc.

A careful noting of the study/ evaluation will be the skeleton/foundation on which the report has to be built up. Hence special attention may be given in taking down and keeping under safe custody of such notes. Such notes, if kept in the respective files will be useful for future reference also.

While in the field, it is advantageous to cross check and compare with existing projects/programmes of similar type or nature. Also to hold consultation for expert opinion of technically qualified and experienced personnel, and to quote them if they do not object, will substantiate the arguments in favour or against in the analysis and interpretation of data.

**IV.** In reporting, relevant data, as per the manual be furnished. Too lengthy reports can be avoided but the report cannot remain sketchy. Brief reports incorporating essential data and enclosing supportive documents to facilitate the presentation of synopsis to the sanctioning committee, with clarity for an objective decision is essential. There is no harm, if the positive and negative points in a project are presented side by side as highlights at the end of the report as a **conclusion**.

## Project Formulation

### 1. Proforma

- a) Background information
- b) Legal aspects
- c) Organisational aspects
- d) Technical feasibility
- e) Economic viability
- f) Self-help/Local contribution
- g) Loan capacity, Mutual aid, continuity, Revolving fund, channelling of funds
- h) Beneficiary Pattern
- i) Supervision
- j) Government/Voluntary agency collaboration
- k) Cost analysis
- l) Other appeals/Aid received
- m) Recommendation/Observation/Comment.

### Text

#### A. Basic Data

Title	...
Ref. No.	...
Applicant	...
Amount Requested	...

#### B. Enclosures

The list of enclosures to be serially mentioned, in order, as per the various heads of the proforma, so that they can be referred for study/perusal/verification as the report is processed for a decision.

## **C. Text of Project**

### **I. Background Information**

- a)** Depending upon the proforma used for formulating the project the location and socio-economic background of the Community be given supported by facts and figures.
- b)** Relate the condition of the beneficiary group/institution in the light of existing infra-structures/overall general socio-economic condition.
- c)** Provide information on congregations, societies, other local structures namely parishes, pious associations etc. who will be directly involved in the implementation of the project. A historical and chronological review of the structure, function, activities and progress of the agency, society, which will implement the project/programme may be given.

#### **Eg. Parish/Congregation/Society/Youth forum/Vincent De Paul Society etc.**

Brief note, on the establishment, purpose, activity, personnel, maintenance, financial assets, administrative soundness, accountability, membership etc. may be given.

- d)** The background of the project proposal leading to the specific need and situation which has led to making the appeal.
- e)** Indicate the root causes of under development, influence of middlemen, administrative bureaucracy, exploitative structures influencing the life of the people.

### **II. Legal Aspects**

- a)** In the case of registered societies copy of the registration certificate to be furnished.
- b)** Copy of the bye-laws to be furnished.
- c)** In the case of un-registered bodies/groups, possibility of registering and action taken/envisaged in this regard to be mentioned.
- d)** In case of parishes/dioceses/congregations/pious associations clarify the legal position. It is advisable to obtain statement/written documents/permissions from the competent and authorised bodies to avoid legal hurdles in the implementation of the project.
- e)** The feasibility and possibility of/and agreement in channelling funds through credit institutions like bank/co-operative societies may be mentioned. If so, documents to support the agreement.
- f)** Note on the registered ownership of the project and comment on accessibility, custody of input, right of ownership, transfer of ownership, utilization of common amenities and public property, legal permission etc. may be given to clear the legal and registered titles.

g) In the case of co-operatives, the bye-laws of the society need be scrutinised to assess the provision to accept loan/grant from financial institutions/voluntary bodies. The borrowing power based on the maximum credit limit (M.C.L.) of the society in relation to the paid-up capital and borrowing power of individual members of the society need also be assessed.

h) **Foreign Contribution Regulation Act**

With the introduction of foreign contribution regulation act 1978, the legalities involved in obtaining foreign funds for projects, its reporting and accounting has become very important.

Under the provisions of the act, those who are recipients of foreign funds are obliged to :

1. Submit to the Government, Home Department, a return on the receipt of funds in a prescribed form within 6 months from the date of receipt.
2. A report on the utilisation of funds and an audited statement of account on or before the 31st of March the following year in the prescribed form. This report and audited accounts are essential even if the funds remain unspent.

Failure to submit such reports and contravening the provisions of the Act are cognisable offence and liable to punishment under the act.

### **III. Organisational Aspects**

- a) Assess and mention the awareness of the beneficiaries about the appeal. If not aware, mention the reason for the lack of awareness.
- b) If aware, the extent of awareness—indicate the process and progress achieved in involving beneficiaries.
- c) Measure the organisational involvement of beneficiaries in the planning of the project and in the process of decision making in the administration of project.
- d) Participatory action in exercising collective responsibilities through saving scheme, taking advantage of subsidies from SFDA/Government/Block etc. may be mentioned to illustrate the organisational involvement.
- e) Ways and means of involving people at all stages of project administration namely mobilisation of self-help through saving schemes, formulation of rules and regulation, working out the criterion for selection, application of criterion in decision making, collective action for demanding rights and privileges, organise mass action against oppression and exploitation etc. can be undertaken. Use examples and instances wherever possible.

f) Adopt grass root planning, supervision by representative bodies of people development of local leadership etc. Inform instruct and associate wherever possible through dialogue, correspondence, meeting and inculcate the idea of organisational involvement of project beneficiaries. Evaluate the depth of participation from time to time, so that the project is relevant to the people. Even with limitations the project holder and beneficiary group can strive for a process oriented development approach.

#### IV. Technical Feasibility

The technical background of a programme is studied to analyse and judge.

- a) the feasibility for implementation of the proposal;
- b) consider the feasibility of investment;
- c) possibility of continued sustenance of the programme for development of people.

As the technical feasibility differ from project to project, they are listed subject wise. The data required under each type of project is indicated so as to avoid generalisation, and to enable the furnishing of specific data.

### AGRICULTURAL PROJECTS

#### 1. Land Reclamation Project

- a) Mention type of reclamation namely levelling, contour bunding, contour terracing, removal of scrub jungle, reclamation of alkaline or acid soils, construction of embankment etc.
- b) Details on slope (gradient) extent of scrub jungle growth, concentration of alkalinity, salinity, acidity etc.
- c) Enumerate the deleterious effects due to the above conditions.
- d) The measures, effectiveness, efficiency etc. of the operation envisaged under the programme be mentioned.
- e) Technical (skill) competence available for supervision and implementation.
- f) Skill/competence of the beneficiaries vis-a-vis the technology introduced in the programme.

#### 2. Irrigation Project

- a) Differentiate surface and sub-surface source of water.
- b) In the case of surface source, indicate the adequacy of the source namely river, pond, tank, rivulet, stream etc. for the requirement of irrigation.  
Documentary evidence of permission obtained to be furnished.
- c) Mention the method of diverting water namely gravitational flow or through lift irrigation. Furnish the design and make

of the equipment used namely—checkdam, embankment, channel, pipeline, sluice, spill-way etc.

- d) In the case of pumpsets comment on the size, type, capacity, suitability for the purpose assigned, relative merits with reference to other models, make, type, availability of what is proposed. Furnish documents from dealers/experts to authenticate the technical data.
- e) In the case of sub-surface source the details on the dimension-depth, width/diameter, sub-soil water level, quantum of water available, data on draw down and recuperation rate, comparative data from existing units, etc. may be given. The services of hydro-geologist/water diviner could be used in investigating water availability,
- f) The details on cropping pattern, crop rotation, cropped area, soil type, rotation of irrigation, area which can be irrigated taking into account the above may be given.
- g) Availability of electricity, possibility of immediate electric connection, nearness to electric mains, capacity of transformer to take additional load, preference for diesel or petrol or kerosene engine—relative merit on maintenance, mobility, terrain etc. may be furnished.
- h) Availability of spares, services, repair facility in the locality.
- i) Technological standard of beneficiaries to handle the machines independently.
- j) Availability of diesel, kerosene, petrol in the area.
- k) Market for crop produce, facility for co-operative credit.
- l) Availability of inputs like seed/fertilizers/pesticides/recurring cost for crop loan, technical advice and consultancy service etc.

### 3. Mechanisation of Agriculture

Tractor customs service/Power tiller/Dusters/Sprayers/Mobile Pumpsets/Harvesters/Winnowing machines

- a) Indicate existing methods of operation, its sufficiency, inefficiency, describe the envisaged need and objectives to be achieved.
- b) Terrain of land, size of plots, suitability for mechanised tillage.
- c) Availability of machines, locally or otherwise, the nearest dealer.
- d) Local demand for customs services, data to support the claim to be furnished.
- e) Capacity of the machine/equipment and data to support the full utilization of the machine to be furnished.
- f) Availability of experienced/qualified operators, spares, repair/service facility etc. may be indicated.

- g) Capacity of beneficiaries to pay in advance be mentioned, if credit needed for the customs service, how the same is organized, repayment schedule and collection in cash/kind arrangement to be detailed.
- h) Detail the procedures for customs service—method of booking and allocation, arrangement for efficient and timely operation.
- i) Mention the social and economic dimension of the custom service rendered namely reduced rate—credit service, economy of investment, double cropping, increase in yield, etc.

#### 4. Model/Demonstration Farm

- a) Mention objectives of the proposal in detail indicating the extent of transfer of knowledge/methodology envisaged.
- b) Approach, organisation and structure of implementing the programme.
- c) Suitability of the site for the demonstration farm in relation to the total demand of the area, people's response, accessibility etc.
- d) Rapport of the project holder/group/institution with the proposed beneficiary and the possibility of communication/dialogue.
- e) Availability of technically qualified or experienced personnel on a permanent basis to implement the project. Expertise/consultancy services/collaboration with expert bodies etc. be mentioned.
- f) Technological gap—the difference in technological standard between what is existing and what is proposed for implementation in relation to the beneficiaries/locality.
- g) Details of the programme content, technical matters namely physical features (soil, vegetation, terrain) inputs (seed sand, fertilizer, pesticides, irrigation) infra-structure (electricity, credit, market) and administration as well as income pattern, utilization of income towards the objectives may be outlined.

#### 5. Fertilizers/Pesticides/Seeds/Multipurpose Farm

- a) Availability/non-availability of the input/facility. Mention the objectives for planning the programme.
- b) Existing practice/trade barriers/bottle-necks/impediments etc. which have prompted to propose the project.  
Relative advantages of the proposal in comparison with the existing methods of cultivation.
- d) Indicate the fertilizer formula planned to be used, cropping pattern planned, soil type, irrigation, climatic condition, technical competence, etc.
- e) Modus operandi of the programme, organisation and distribution of inputs, safe custody etc. may be mentioned.

- f) Technological standing of the beneficiaries in relation to the proposed programme.
- g) Availability of Personnel (full time/part time) for implementation of the project.
- h) Need for credit, guarantee, safety clauses, for repayment worked out and procedures envisaged etc. be mentioned.
- i) Availability of storage facility/dealership/licence etc. needed for the implementation of the project.

## **ANIMAL HUSBANDRY PROJECT**

- 6. Dairy/Poultry/Piggery/Goat Rearing/Draft Animal Projects**
- a) Furnish the design, structure and construction plan of the building accommodating the live-stock, indicate the sufficiency or otherwise of space allocated for each stock and for amenities like office, store, calf pen or similar facilities.
- b) Mention the breed of animal/bird, availability for purchase in the locality or the source from where they can be procured as also the feasibility of introducing the breed/type of stock etc. Also mention the reason for selecting the particular breed.
- c) Indicate availability of dry and green fodder--by cultivation on one's own field or gathering from fields of others or to be purchased. Indicate availability of grazing area, green leaves, scrub jungle etc. Provision for rearing progeny (young ones) to be provided in the budget.
- d) Type of concentrates planned to be fed, its availability in the locality. If not available, what arrangements are made for continued and prompt supply at normal cost. Mention if there is a plan to mix the concentrates locally and the availability of raw material in doing so.
- e) Veterinary and breeding facilities existing in the area. Mention the distance, accessibility, type of technical personnel available at the centre and the type of facility offered at the centre and their effectiveness. Documents supporting the understanding between the Government centre and the project would be useful to indicate collaboration.
- f) Market for milk, egg, meat etc. or demand for draft animals to ensure full utilisation etc. to be indicated. Documents to support the claim and arrangement made with marketing co-operatives or Government institutions or local groups may be furnished.
- g) Capacity/knowledge of beneficiary group to maintain the type of animal/breed/ (technological standard) proposed.
- h) Availability of trained, qualified and experienced personnel for management at the project level. Mention the name, qualification/experience/whether full time or part time.

- i) Mention the cultural, legal, ecological issues which can crop up as a result of implementation of the project eg :—
  - 1. Piggery in Muslim majority locality.
  - 2. Goat rearing regulations of forest department.
  - 3. Milch animals—among tribals.
- j) Indicate provision for insurance/mortality fund and how the same is organized.

## FISHERY PROJECT

- 7. Sea fishing/Inland fishing/Mechanised fishing/tank fishing/ fish culture (*Boat, net, launch, lines, hooks*)
  - a) Mention the design of the craft/hull and engine as also the net, lines, hooks and indicating their suitability for the purpose for which it is selected. The availability, popularity, relative efficiency with the existing units and comparative data be furnished. If similar projects are operational quote the feasibility.
  - b) Dimension and design of pond, tank and capacity of fish culture, details of fish nursery, source of fish, variety, growth factor, consumer tendency, popularity, local market etc. may be mentioned.
  - c) Facility to land the catch, availability of jetty, accessibility to market, transport facility etc. refrigeration, icing, deep freezing, canning facilities, etc. may be mentioned.
  - d) Skill of beneficiary group—knowledge and experience in the use of new gadgets/tackles if they are newly introduced/need for training, possibility of training in the project or advance training elsewhere envisaged, may be mentioned.
  - e) Indicate the market for fish, arrangements for marketing, influence of middlemen, availability of the services of a marketing society.
  - f) Availability of credit for recurring expenses, if not available what alternative envisaged.
  - g) Licence/permission for fishing, custody of fishing equipment and machinery to be indicated.
  - h) Insurance—if needed, whether possible and facility existing.

## 8. BEE KEEPING

- a) Availability of plantation/horticultural garden/forest vegetation for bee feeding—season of bee keeping in the area, what is the off-season arrangement.
- b) Suitability of climate for bee keeping, availability of hives, design, cost factor, and possibility of obtaining enough number of bee colony, cost for bee colony.

- c) Technical know-how of beneficiaries in bee keeping. Is training needed ? Who will give and when and how it is organized.
- d) Facility existing in the extracting and processing of honey obtained from bee hives. If not existing how processing will be done.
- e) Market for honey, detail the arrangement or agreement with others.
- f) Trained and experienced personnel for supervising the project.
- g) Permission (provide document) of plantation owners/forest officials/ Government farms etc. to keep hives during season.
- h) Number of units for each beneficiaries, whether full time or part time occupation etc. be indicated.

## COTTAGE INDUSTRIES

- 9. Handicrafts (Fibre based—Yarn based) Beedy making, Dress making, Pottery, Soap making, Plasticnetting etc.
- a) Indicate availability of raw material in the locality. If not available locally, explain the arrangements made for procurement, feasibility, dependability, economics of obtaining such supplies to be mentioned.
- b) Explain the various stages of processing the raw material, if available only in crude form, e.g. coir from coconut, fibre from palm, banana yarn after sizing, dyeing etc. Facility for processing in the area and need for getting processed at other places. Need for equipment/instruments/machinery for processing—their availability, efficiency, suitability etc. be indicated.
- c) Mention the type of tools, implements, machines, etc planned to be used, their availability, technological standard with reference to the beneficiary group etc. in the production process and spares, repairs and maintenance facilities to be indicated.
- d) Indicate the skill of people. Are the people trained and experienced ? If not what arrangements for training and who is responsible for training and for what duration. Is there a curriculum followed, and examination fees charged. Maintenance of the project during training and how it is met.
- e) Availability of technically skilled and experienced personnel to manage the project. Procurement of raw material, production, management, market intelligence, liaison with government etc. are to be mentioned.
- f) Indicate the need for the building, suitability of site, design, structure, adequacy of space, allocation of space, etc.
- g) Market for finished product, market survey, documents to support proven market, job orders, sub-contract jobs etc. may be mentioned.
- h) Explain the wage pattern whether daily paid or on piece-work. The relative advantages for the beneficiary as a result of the project in comparison with existing industries.

## TECHNICAL/VOCATIONAL TRAINING/TRAINING CUM PRODUCTION PROJECT

10. Carpentry, Printing, other ITI trades, Sewing, Secretarial Practice etc.
  - a) Mention availability of trainees—full time/part time/seasonal. Interest of trainees and motivation.
  - b) Category of trainees catered to, basic qualification of trainees prescribed in the programme, examinations—diploma/certificate etc. offered. Enclose copy of curriculum—stipulations of the government for a recognised course etc.
  - c) Mention the staff available for imparting training, name, qualification and experience. Permanency of the available staff on the job, provide supporting documents to ensure continued availability of personnel, if they are on honorarium.
  - d) Mention the source of maintenance of the course, detailed budget and substantiate the size of budget. Indicate deficit, if any and source of meeting it. Documentation to indicate the possibility of meeting deficit budget. Fees charged, concessions and freeships offered etc. may also be mentioned.
  - e) Give details of the site, building, (design/structure/adequacy/ space allocation etc ) whether simple/functional or sophisticated/elaborate.
  - f) Detail the requirement of tools, implements, equipment, machinery, furniture etc. Substantiate the need, suitability and availability.
  - g) Technological standard of the project vis-a-vis the beneficiaries. Whether the standard is within the assimilative capacity of the trainees.
  - h) Possibility of obtaining employment—full time/part time, seasonal, self employment, job practice, provide document to support the claim.
  - i) Possibility of developing the project to become a production unit or ancillary unit. The planning, organisation, time factor, capital need, marketing etc, of the second phase may be given in detail.
  - j) Sociological/cultural link of the beneficiary group with the new vocation for which training offered or obtained.
  - k) Disposal of finished product during training period. Potential for job orders for maintenance of the training course. Support the claim with documentation.
  - l) Availability of electricity, transport, communication and accessibility be mentioned.

## 11. HEALTH PROJECTS

### General Data :

- a) In the case of an existing dispensary/hospital, review the history/establishment/progress/growth etc. in a chronological order.
- b) Detail the health facilities existing within a radius of 15 kms. Government/Mission/Private nursing home etc. Mention the number of beds, specialisation, diagnosis and treatment facilities in the above institutions.
- c) Furnish the details of facilities available in the hospital/ dispensary seeking aid.
- d) Present staffing pattern indicating, specialist, general, technical staff, para-medical workers, menials etc.
- e) Statistics showing, out-patients (New/Old). In-patients, labour cases, (normal/forceps/vaccum caesarian), lab tests, immunisations, ambulance mileage, etc. for the last three years may be given.
- f) Indicate the present financial status of the hospital/dispensary. Mention the charges levied for various services and treatments namely registration/consultation, medicines (charged over the cost prices) injections, X-ray, ECG, operations, labour cases, bed charges (General and private) laboratory tests, ambulance charges, immunisation fees, other levies etc. Enclose the statement of accounts (preferably audited) for the last three/two years.
- g) **Preventive programme/community health work**

Give an account, in brief the activities undertaken by the institution namely immunisation, health education, paramedical work in leprosy, Tuberculosis, nutrition, Family Planning etc.

- h) An indication of concession and free treatments rendered by the institution and record to support the claim.
- i) In case of new dispensary/hospital data relevant to the area to be covered, population to be served, collaboration possible with Government etc. to be furnished.

## AMBULANCE PROJECT

### Specific Data

- a) Substantiate the need of the ambulance in relation to
  1. lack of facilities in the hospital;
  2. distance from the hospital/dispensary to the referral hospital;
  3. lack of availability of similar facilities in the area;
  4. demand for moving dead bodies;
  5. lack of transport vehicles locally;

- b) Maintenance of the ambulance, means of maintenance, capacity of the hospital to meet the expenses from the general budget of the hospital.
- c) Assessment of full utilization of the vehicle, furnish record/ data to support the claim.
- d) Indicate the type of the vehicle planned to be purchased, its suitability in relation to road condition, terrain and availability of the vehicle in the local market.
- e) Availability of shed, driver, facility for Service, spares, repairs etc. be mentioned.
- f) Possibility of sharing the vehicle with other institutions, agencies, or other activities as part of Public health work.

### MOBILE CLINIC PROJECT

- a) Indicate whether an independent self contained unit or an accessory unit working out of a base hospital with referral facilities. Establish the need for a mobile unit.
- b) Describe the type of vehicle, suitability for the purpose, availability for procurement etc.
- c) Indicate type of road, accessibility, terrain, suitability in relation to road.
- d) Mention the type of equipment and facilities and provisions planned for the mobile clinic.
- e) Detail the plan of operation, programme, the area of operation, effectiveness and continuity envisaged.
- f) Name the Personnel (Separate team), their availability, qualification and experience, permanency on the job, full time or part time etc. may be given.
- g) Indicate the fees charged and income expected, against expenses on salary, medicine, vehicle maintenance. Furnish the budget and how the deficit, if any, is met.
- h) Furnish an area map showing the villages, places of visit and prepare the schedule of visit. The scope of the programme being supported by the villagers etc. may also be indicated.
- i) Any other task, other than mobile clinic—explain.

### CONVEYANCE FOR OUT REACH/COMMUNITY HEALTH PROGRAMME

- a) Type of vehicle, suitability for the purpose, availability etc. Type of road, accessibility, terrain be indicated.
- b) Detail the programme—objectives of the proposal, the planned strategy and plan of operation.
- c) Availability of qualified/trained and experienced personnel for the (specialised) task, permanency of the staff, if honorary, on the programme.

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- d) Indicate to which referral hospital, the programme is attached and how the same is integrated with the hospital, reliability for diagnosis and specialised treatment.
- e) The budget provisions and the possibility to meet the maintenance locally, be indicated. If the budget is in deficit, proposal to meet the same.
- f) The possibility of collaboration with local panchayat agencies/integration with Government and other bodies like Lion's Club/Rotary Club/Pius Associations, etc. may be mentioned.
- g) Facilities available at outstations and their adequacy for efficient operation, facility for examination, storage of medicines, education material and volunteers be given.
- h) Detail the arrangement for periodic evaluation on the basis of feed back from the field/patients/beneficiary.
- i) Indications to use the vehicle as a multipurpose one taking into account the development of the programme to other sectors other than medical work.

## **EQUIPMENT PROJECTS**

### **Laboratory equipment, ECG, X-ray, theatre equipment, labour room equipment**

- a) Mention the existing facility, its inadequacy for diagnosis and treatment in relation to the proposal for equipment, thereby substantiating the need.
- b) Substantiation of the appeal in relation to patient welfare, staff (specialist) efficiency, diagnosis requirement, efficiency of operation, treatment/service, generation of income etc. be given.
- c) Indicate the availability (name) of qualified and experienced personnel capable of handling/using the equipment/plant (document to prove the claim be given).
- d) Possibility of proper maintenance/service and repair as also replacement of the equipment/machinery.
- e) Detail the facilities available to accommodate the programme, use of the equipment or machine/plant etc. and the adequacy with reference to medical standards and requirements.
- f) Availability of water supply, electricity voltage, nearness to electric mains, capacity of transformer, possibility of connection etc. in case of electrically operated equipment.
- g) Availability of electrical equipment/film/accessories etc. and need for storage, bulk purchase. Other facilities needed, essential for the efficient use of equipment/machine may also be mentioned.

- h) Elaborate on the practical problems/difficulties in not being able to use similar facilities, non availability of these facilities in the neighbouring hospital/dispensary, to avoid duplication and competition etc.
- i) Indicate the relative merit in terms of upgrading the treatment/service, improving financial position, obtaining a larger patronage, independence from other institutions etc.
- j) Comment on the fuller utilisation of the equipment/facility so that the investment become useful to large number of beneficiaries and also able to maintain itself and regenerate capital for expansion.

## **HOSPITAL BUILDING**

Dispensary/expansion of in-patient ward/special wards/accommodation for X-ray, laboratory, Operation theatre, labour room etc.

- a) Furnish the design, structure and architectural aspects of the proposed construction.
- b) Establish the need of additional construction—based on lack of such facilities, rush of in-patients, need for specialisation etc.
- c) Maintenance details of the building, whether the structure and design is simple enough not to tax the general budget for maintenance.
- d) Comment whether the proposed construction meets with specification of the medical line eg. X-ray room, dark room, developing room, lavatory etc.
- e) Adequate personnel availability to run the expanded or additional facilities, their qualification/permanency, if honorary. Capacity to pay, if full time paid staff envisaged.
- f) Availability of furniture/equipment etc. for the efficient and fuller use of the additional building space.

## **COMMUNITY HEALTH PROJECTS**

- a) Explain the programmes in detail, area of operation.
- b) Describe the objectives and indicate whether they are in tune with the standards and aspirations of local people.
- c) Explain the strategy/methodology of operation and how far it can be assessed as feasible.
- d) Indicate the element of people's participation, local involvement/extent of collaboration of local bodies etc.
- e) Availability of staff—technical/administrative, full time or part time paid/voluntary specialist/para-medical.

- f) Phasing of programme, indicate the possible growth of the project to cover larger area and how the growth is planned, area map be furnished, with growth pattern.
- g) The source of income, financing pattern, deficit, issue to meet the deficit etc. are to be described.
- h) Explain the technical details of other community development programmes, integrated into the health project.

## 12. DEBT REDEMPTION SCHEME

### 12. Credit scheme for marginalised groups

- a) Indicate the reliability of data available/provided, regarding the extent of debts/nature of debts/need for credit; possibility of redemption/avoidance of middlemen etc.
- b) Mention the possibility of the beneficiary/middleman's co-operation in implementing the project.
- c) Explain the feasibility of the redeeming plan and the potentiality of subsequent rehabilitation to avoid similar occurrence. Mention the safety measures introduced and or possibility of introducing such measures.
- d) Relative merits of the proposal and the far reaching benefits envisioned.
- e) Indicate the need for continued credit facility on easy terms, the need for educative organisation of the group, the need for a development/revolving fund to avoid retracing the earlier steps. Detail the measures envisaged.
- f) Elaborate the guarantee demanded to ensure repayment and whether they are practical.
- g) Personnel available to organise, motivate, mediate, plan, execute and continue the programme.
- h) Estimation of the future need of redeemed beneficiary, whether the future need is included in the plan, if not how the same will be met.
- i) How far the government legislations help and to what extent the debt redemption projects will have relevance in the situation.

## 13. CO-OPERATIVES

### 13. Consumer, Credit, Thrift, Marketing Co-operatives :

- a) Measure the extent of co-operation among the beneficiaries, use incidents, instances and proven progress to highlight the issue.

- b) Describe the relative merits supported by data to substantiate the programme. Bring to light the ill effects suffered due to the existing disorganised and non-cooperative individual behaviour.
- c) Mention the availability of honest, dedicated, motivated personnel to run the co-operative.
- d) Detail the extent of patronage from the point of involvement, willingness to use facility offered, behaviour pattern of the beneficiaries.
- e) Highlight the operational details, frame work of operation, co-operation with concerned Government Department and show the feasibility.
- f) Insight into the projected advantages, anticipated change in mentality based on observation from the progress if any already achieved. Basis to judge the feasibility be established.
- g) Procedures of accounting/custody of cash/auditing/meeting etc. Provision for periodical evaluation be mentioned.
- h) Indicate availability of the accommodation to house the programme and its suitability for the purpose.
- i) Possible competition, suppression at the hands of existing monopoly dealer and how far it will affect the project.
- j) Size of the project to withstand the above pressure, the economics of scale to combat the monopoly game.

#### **14. SOCIAL WELFARE PROJECT**

- 14. Home for destitutes, aged and abandoned, incurables, dying, handicapped (mentally, physically) lepers etc.**
  - a) Establish the need to start such a project—offer justification.
  - b) Mention the source of meeting the day to day maintenance—provide details of budget.
  - c) Plan and estimate of construction, site plan, ground plan, estimate, quotation for construction and equipment.
  - d) Availability of dedicated, experienced personnel to look after the various categories of destitutes as the situation and job demand.
  - e) Indicate Government recognition and subsidy from Government.
  - f) Permission for construction from local authority.

#### **15. DRINKING WATER PROJECT**

- a) Describe the water table, source of water, potability of water, adequacy of water available for the area and envisaged number of beneficiaries.

- b) Establish the need for motor/engine and pump, type, suitability to the task, capacity etc. Electricity, availability for electric connection.
- c) Calculations to indicate the availability of water and its distribution to prove that the requirements can be met.
- d) Explain the need for pipeline, overhead tank, fittings, etc. The size, capacity, suitability etc. Whether a need/comfort/luxury etc. be elaborated.
- e) Plan of arrangements for distribution/equidistribution, local supervision and personnel responsible to be indicated.
- f) Maintenance of the unit—arrangement for collection of dues—deficit in maintenance, indicate who will meet the deficit.
- g) Indicate the financial advantage/saving of time factor, improving the health and hygiene by preventing diseases, improving drainage, personal hygiene etc. of beneficiaries. Describe the relative merits to prove the feasibility and measures envisaged to bring the above into effect.
- h) Possibility of using excess water/idle capacity of lifting device for productive purposes, e.g. kitchen garden/agriculture etc.
- i) The ownership of the property on which the well (community based) is situated, its accessibility to the community—permission from local bodies, written agreement from the owner of property etc. to ensure access and continuity.

## 16. EDUCATIONAL PROGRAMME

### 16. Seminars, camps, for animators, workers, educators etc.

- a) Explain the content of education/animation/organisation of the programme. The strategy proposed to be used and methods to be followed. The proven results from instances and similar programmes to compare and conclude.
- b) Reflect on the state of the group which necessitates the launching of the programme to create awareness, if aware to motivate, if motivated to launch an action programme.
- c) Availability of personnel, qualification/experience/professional background of the staff/educator/group, launching the scheme, be mentioned,
- d) Describe the area of operation—specific programme through which the education is proposed to be implemented. The category of group to be educated, the objectives in detail and how far the approach and strategy is relevant to their standard, life style, circumstances and understanding.

- e) Detail the organisational planning of the programme, stages of implementation with built in periodical evaluation and envisaged (projected) results.
- f) Furnish the detailed budget and its relevance from the point of view of the project as an investment.
- g) Detail the various mass media tools proposed to be used especially in functional literacy and non-formal education and how far it can be effective and comparable in cost, content and purpose with formal education.

## 17. CULVERTS/BRIDGES/ROADS

- a) Explain the relative disadvantages and advantages in relation to the present situation, means of transport, communication, marketing, cost of production, denial of facilities like education, health service etc.
- b) Submit the plan, estimate etc. of construction—site plan, detailed plan, and estimate to be worked out.
- c) Obtain documents from Government/Panchayat/Local bodies/ individual owners clearing the legal hurdles in the implementation of projects.
- d) Name of personnel responsible, availability, qualification, competence with details of experience.
- e) The real benefits which could be derived and which will prove the feasibility of investment. The impact of physical development which can be brought about. The unintended effects of providing such facilities, if not guarded against vested interests.
- f) The relative priority of the proposal in relation to other developmental needs through productive proposals.
- g) Maintenance and supervision—who will be responsible for continued maintenance and whether the unit is to be retained or handed over to the Panchayat/Government. In doing so the understanding with public bodies.

## 18. SANITATION/HYGIENE/DRAINAGE

- a) Describe the existing facilities or lack of facilities, relate the condition in terms of health hazards/public hygiene to substantiate the need of the proposal.
- b) Comment on the measure proposed, the plan, design, suitability, adequacy etc. to the situation and group.
- c) Check whether Government/Panchayat, permission needed. If so obtain documents in support.
- d) Details of the name, qualification, experience of personnel to implement, supervise and maintain the programme.

- e) Comment on the built-in ideas, notions, sentiments of the people, their understanding, standard of hygiene, out-look, willingness to use facilities offered, co-operation which can be foreseen etc.
- f) Indicate the possibility of maintenance, proper utilisation by people, whether requires to be handed over to panchayat/ Government. Possibility of people/Government Officials losing interest in the project.

## 19. GOBAR GAS PLANT

- a) Comment on the source of raw material and feasibility of its use, cow dung, human excreta or other exudes.
- b) Indication of the capacity of the gas plant in relation to the quantity of raw material available.
- c) Number of animals/people/other raw material producing units and sufficiency in relation to the planned capacity of the gas plant.
- d) Capacity of gas plant and how it will meet the total need of family/institution or industry.
- e) Describe the design, structure, plan and estimate of the gas plant.
- f) Personnel available for implementation and supervision.
- g) Cost of maintenance of the unit, how the same will be met, what facilities exist for repairs, replacement.
- h) Relative advantages between use of firewood and gas from the point of view of cost, health, pollution etc.

## 20. SELF EMPLOYMENT PROGRAMME

Tailoring, copra making, fibre extraction, rice pounding, petty trading, oil extraction, cycle rickshaw, tonga, bullock cart, hand cart plying, vegetable vending, a boat per family, cycle transport, fish vending, rice trading etc.

- a) Explain the availability of raw material locally, if not arrangements for regular supply.
- b) Indicate the possibility of using idle man power for production/job work etc.
- c) Comment on the skill of the beneficiary in undertaking the work and the standard of technology vis-a-vis the standard of beneficiary.
- d) Comment on the patronage in programmes of hiring conveyance, transport etc,
- e) Extent of job orders which can be obtained for continued employment to make a living.
- f) Possibility of continued work so as to facilitate not only continuity but recovery of the capital invested.

- g) The market for finished/processed goods, if locally not available, what other arrangements.
- h) Need for licence/permission/sanction in undertaking the work from local bodies/dealers/Government Department etc. Possibility of obtaining the same.
- i) Judge the enterprise of individuals/group and indicate the success rate.

## 21. GODOWN/STORAGE PROJECT

- a) Detail the existing facility—inadequacy, suitability to be explained in terms of whether old/dilapidated, non-rat proof, non-damp proof, lacking fumigation facility etc.
- b) Substantiate the need, quoting the tonnage available/expected future need for storage comparing the present capacity.
- c) Furnish the plan, design, indicating scientific provisions for rat proofing, damp proofing, ventilation, loading, unloading facility, fumigation facility etc.
- d) Relative merits in terms of quality maintained, quantity saved from damage, loss reduced in storage, safe custody with reference to community projects, potentiality for guarantee for credit through warehousing and avoidance of pilferage, stealing, speculation etc.

## 22. GRAIN BANK PROJECT

- a) Substantiate the need for organising a grain bank, detail the influence of middle-men, weakness of beneficiaries, helplessness during lean season. The organisational procedure may be explained.
- b) Indicate the storage facility, safe custody, quality control etc.
- c) Need for Government permission and safeguards in food grain, storage etc., whether permission obtained, if not what measures planned.
- d) Detail the norms and procedures laid down governing the projects.
- e) Explain the built-in mechanism and processes evolved in rooting out the evil of borrowing/contracting loans at exorbitant rates.
- f) Availability of grain, season of procurement, safety measures for lean season etc. may be mentioned to compare the benefit.
- g) Local convention and public opinion existing between local dealers and beneficiary group. The effectiveness of the strategy evolved in making the proposal successful and feasible.

- h) Availability of competent and honest supervisor who can implement the project, motivate and educate the beneficiaries.

### **23. TRANSPORT PROJECT**

- a) Availability of transport facility in the area. If available the cost, if not available what alternatives are in practice—how efficient, economical etc.
- b) Assess the tonnage available for transport, period during which available, possibility of full utilisation of the transport proposed.
- c) Type of transport, capacity, availability etc.
- d) Relative/comparative advantage/convenience in owning a transport vehicle than hiring one.
- e) Reliable personnel to drive/run the transport available.
- f) Facility for service/repairs/replacements (spares) locally.
- g) Suitability of vehicle in relation to terrain, task, quantum of work and type of material to be transported, need for renovation, fabrication needed for the vehicle for efficient use.
- h) Disadvantage if any due to the introduction of such facility example for people engaged in transport with conventional model which are more labour intensive Rehabilitation measure needed/desirable.

### **24. HOSTELS PROJECT**

#### **For Tribals/Harijan/Destitutes**

- a) Substantiate the need, giving details of lack of transport, lack of educational facility, inaccessibility etc.
- b) Relative merit and advantage of establishing a hostel to meet a basic need and how far the investment will help or mar area development.
- c) Furnish the design/structure/plan/cost of construction, capacity to accommodate, amenities provided for the inmates.
- d) Assess the strength and weakness of dealing with the students/ trainees from their social group and the merits/demerits of hostelites adjusting themselves to the village/rural situations. The sociological implications may be indicated.
- e) Detail the constructive results, targets which can be achieved, so as to assess the feasibility of investment as a priority for the area and people.

### **25. EMBANKMENTS/PROTECTIVE WALLS/FLOOD CONTROL DEVICE ETC.**

- a) Provide the data substantiating the need.

- b) Furnish the plan, structure, design etc. of the measure and judge the suitability under expert opinion.
- c) Government permission/sanction to implement the project, if needed obtain the letter.
- d) Possibility of using the project for other development efforts, co-operation, group activity etc. among the beneficiary group or area.
- e) Relative merits of the investment to prove the feasibility.
- f) Relative merits of investment in comparison with other productive/development programme which could have been normally preferred.
- g) Maintenance of the project, how met, whether to be handed over to local bodies/Government.
- h) Personnel available for implementation/supervision.

## 26. HOUSING PROJECT

- a) Examine the need of housing from the social, economic, hygiene and moral point of view. Indicate the deleterious effects of congested, unhygienic, unventilated houses.
- b) Comment on the possibility of using the housing project for development, through human values in co-operation, mobilisation of resources, self-help, sense of dignity, responsibility etc.
- c) Relative merits of the investment from the point of view of continuity, benefit to the ultimate beneficiary, lasting values etc. could be outlined.
- d) Availability of land, reclamation (levelling etc.) requirement of the plot, accessibility to the plot etc. and road transport to the site.
- e) Furnish the plan, design, structure etc. of the house the sufficiency, simplicity etc. could be mentioned.
- f) Comparative data on the preference for investment in a housing project instead of other productive/development/ employment programmes.
- g) Personnel to supervise the implementation.
- h) Availability of building materials, skilled workers etc.
- i) Permission from local bodies/Government for undertaking construction.
- j) Provision for drainage, water supply, sewage.
- k) Proximity to work place, school, worship place, if it is a colony away from the earlier dwelling places.

## 27. EMERGENCY PROJECTS

- a) Historical review of the incident, gravity, extent of damage,

need for relief and rehabilitation supported by data and statistics. Furnish Government press releases, newspaper clippings, photographs etc. in support.

- b) Explain the measures proposed to combat the situation whether immediate relief or long term rehabilitation and how the programme planning (strategy) is embarked upon.
- c) Personnel available—full time/part time/paid/volunteer—their qualification/experience/dedication etc.
- d) Understanding with Government/local bodies, other voluntary agencies to avoid duplication and to conserve available resources for limited area to make the investment effective and result oriented.
- e) Explain the technical feasibility/depending upon the information solicited in the earlier pages of the manual.
- f) The extent of people's participation, the social/moral political and economic implications in the given situation and the effectiveness of the programme in being a succour to the people.

#### V. Economic Viability :

The viability of investment is required to be assessed for two major reasons.

- a) To establish the possibility of recovery of capital so as to ensure re-investment, expansion, continuity etc.
- b) To assess the loan capacity of a project as the same is directly related to the generation of income not only to meet the recurring costs but also to generate excess income to facilitate repayment.

It may also be considered that the viability of a project may also substantiate the technical feasibility of a proposal. A technically feasible proposal can be a failure, if the viability is poor especially from the point of view of maintenance and continuity.

It is also necessary that the viability and loan capacity be differentiated. In viable projects, which are usually productive, the determinant of loan capacity is based on other factors, especially in projects where the income generated through the investment is meant to support social needs.

The viability of projects in our economic pattern will ultimately determine the success/failure rate of projects. However there are a variety of social investments, where viability cannot be taken as the main criterion to measure success/failure etc. as such but the viability has to be viewed from that angle as an investment in people for long range benefits.

In the working out of economic viability of a project the following factors will act as a basis on which final figures are arrived at:

- a) Basic data : On which calculations are based.
- b) Rates for unit : Price/wage/cost/value etc.
- c) Assumptions : In the planning stage normally assumptions are made to project the financial out lay and its viability.
- d) Foot Note : Will explain elements/factors not included but can be considered as deleted eg : Notes on depreciation fund, interest on capital, reasons for not detailing the profit utilisation plan, possibility of using the interest calculated for repayment etc.

## AGRICULTURAL PROJECT:

### Irrigation-seed-fertilizer-pesticides—reclamation etc.

- A. Basic Data : (Use those valid in specific projects)
  - 1. Capacity of well/pump/per acre/day.
  - 2. Electricity consumption units/per hour/acre.
  - 3. Number of hours per irrigation per acre.
  - 4. Number of crops per acre per year—cropped area.
  - 5. Oil/diesal consumption per hour/acre/per crop/irrigation.
  - 6. Seed rate per acre kg/acre.
  - 7. Fertiliser schedule –NPK combination kg/acre.
  - 8. Pesticides/fungicides per acre in Rupees.
  - 9. Man power per acre/operation.
  - 10. Other farm power/mechanised/labour intensive.
  - 11. Yield per acre of grain/fodder in quintal/ton.

### B. Rates :

- 1. Rate per pair of bullock hire.
- 2. Rate per worker.
- 3. Rate per kg. of seed/fertiliser/pesticides .
- 4. Rate per unit of electricity.
- 5. Rate per litre of diesel/petrol/mobile oil.
- 6. Rate per hour of tractor/power tiller hire.
- 7. Sale value per quintal of seed/grain/crop produce.
- 8. Sale value per ton/quintal of fodder/other bi-product.

### C. Depreciation—Percentage on machinery/building/equipment.

D. Interest on Capital—Percentage on non-recurring/recurring capital.

E. Overhead/trade expenses—lump sum/percentage provision.

**Economics of cultivation (name crop) Cost per acre**

1. Ploughing/land preparation—bullock days/hours/tractor days/men days	Rs.
2. Seed—kg—@Rs.—	Rs.
3. Sowing/planting Bullock pairs/labour hours	Rs.
4. Manures/fertilisers—kgs. @	Rs.
5. Irrigation No :—@ Rs.	Rs.
6. Plant protection No : spraying/No : Dusting @ Rs.	Rs.
7. After care-weeding/inter-cultivation pairs @ Men/Women	Rs.
8. Harvesting/transporting/preparing/marketing Man @— Women @—	Rs.
9. Administration/technical supervision	Rs.
10. Night watch/bird scaring etc.	Rs.
11. Any other items (specify)	
	Total Expenditure
	Rs.

**Income per acre**

1. Quantity of grain per acre @ Rs.	Rs.
2. Quantity of fodder/other bi-products @ Rs.	Rs.
3. Gross income per acre per crop	Rs.
4. Gross income per acre per year	Rs.
5. Less depreciation	Rs.
6. Less interest on capital	Rs.
7. Less other expenses if any	Rs.

**Net profit**

**Percentage of profit net profit X 100 = %**

**capital**

## Utilisation of profit—Projections-budgeting

### NOTE

1. Indicate whether depreciation fund is planned or not, if not, how replacement of the equipment envisaged.
2. Interest on capital payable or not, if not how utilisation of the interest calculated but not paid.
3. Other comments :

### Customs Service

#### Tractor/Power tiller/Oil engines/Sprayers/Harvesters/Winnowers/Dusters:

##### Basic data/rates etc.

1. Annual running hours category wise.
2. Cost per hour of operation-chargeable.
3. Quantum of work-turnover per hour in acres.
4. Taxes payable—licence/road tax etc.
5. Wages—operator—helper per month/worker per day.
6. Insurance payable.
7. Rate per litre of fuel, mobile oil etc.
8. Repairs services—Rs. etc.

##### Expenditure—(Calculated hours/year on various works)

1. Cost of fuel—litre @ Rs.	Rs.
2. Cost of mobile oil litre @ Rs.	Rs.
3. Repairs/service/replacements—lump sum or percentage	Rs.
4. Wages/salary of operator @ Helper @ Men @	Rs.
5. Tax/insurance	Rs.
6. Administrative/technical supervision	Rs.

##### Total Cost

##### Income :

1. By hire for ploughing/irrigation/spraying hrs/acre @ Rs. hrs/acre
2. By transporting/mileage @/mile

##### Total Income

### **Gross income :**

Less Depreciation	%
Less interest on capital	%
Less Income Tax payable	%
Net profit	

## Utilization of profit-Projections-Budgetting

## ANIMAL HUSBANDRY PROJECT :

— 1 —

- a) Yield data/average per lactation or phased/graduated levels of yield.
- b) Dry period in months—(Non-Lactating) growing period for heifers, fattening period, non-laying period etc.
- c) Feeding schedule—concentrates/green fodder/dry fodder.
- d) Cost of concentrates/per Kg./quintal.
- e) Cost/Value of fodder/grain.
- f) Sale value of milk/meat/egg/wool.
- g) Veterinary charges/medicines.
- h) Breeding expenses/hatching/mating etc.
- i) Valuation of dung/litter/excreta.
- j) Valuation of calf/kid/piggling/un-economic layers.
- k) Degeneration of stock-value lost/percentage.

**Expenditure :** (Including dry period/growing period/fattening period etc.)

1. Cost of feed and fodder kg. @ Rs.	Rs.
2. Wages for minding the stock	Rs.
3. Cost of veterinary care	Rs.
4. Breeding/mating/hatching expenses	Rs.
5. Marketing expenses	Rs.
6. Electricity/water supply	Rs.

7. Administrative/Supervisory expenses Rs.

---

Total

**Income :**

1. By sale of litre milk/kg./meat/ wool/No. eggs	Rs.
2. Value of dung/litter/excreta	Rs.
3. By value of calf/stock/pigglings/kid etc.	Rs.

Total

**Gross Income :**

Less depreciation of building/equipment	Rs.
Less interest on capital	Rs.
Less Tax payable	Rs.

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Net Income/percentage profit Rs.

Utilisation/allocation of net profit—budget

**FISHING PROJECT :** (Mechanised/Manual/  
Sea/Inland)

**Basic data**

- a) Number of days of fishing
- b) Average assumed catch per day @ Rs.
- c) Commission for sale—percentage
- d) Wages pattern—percentage
- e) Maintenance/repairs—percentage of catch—
- f) Miscellaneous expenses permitted @ Rs./fishermen/  
group.
- g) Hire charges/share/dividends for boat/net.

**Expenditure :**

1. Wages—Cash/kind, men @ Rs.
2. Petty expenses (Tea/beedy etc.) men @ Rs.
3. License/tax etc. to local bodies @/month/year Rs.
4. Repairs/service/maintenance to boat/net Rs.

5. Cost of diesel/petrol/kerosene/mobile oil in mechanised boat	Rs.
6. Commission to auctioner	Rs.
7. Marketing/transport expenses	Rs.
8. Share/dividend deducted for boat/net hire	Rs.
9. Administrative/supervision expenses	Rs.
10. Insurance cost	Rs.
	-----

Total

**Income :**

a) By sale of catch	
Less incidentals	
Total gross income	Rs.
Less depreciation on boat/engine/net	Rs.
Less interest on capital/percentage	
Less tax payable	
Net income/profit	
Income utilisation	

**Tank/Pond fishery :**

a) Cost of pumping of water	Rs.
b) Cost of fishling Nos. @ Rs.	Rs.
c) Cost of feeding with grains/cow dung etc.	Rs.
d) Wages for catching	Rs.
e) Marketing expenses	Rs.
f) De watering/cleaning/refilling expenses	Rs.
	-----

Total

**Income :**

By sale of—kg of fish @ Rs.	Rs.
Gross Income	
Less annual desilting etc. of pond/tank	Rs.
Less depreciation on net	Rs.
Net profit	Rs.
Percentage profit	
Utilization of profit.	

### Bee Keeping :

#### Expenditure :

a) Cost of bee colony—Rs. per hive	Rs.
b) Royalty to plantation owners to use the plantation @ Rs. per hive	Rs.
c) Wages for watching hives—men @ Rs.	Rs.
d) Transport/Conveyance expenses for hives	Rs.
e) Honey extraction/processing charges Rs./litre	Rs.
f) Bottling and marketing Expenses	Rs.
	-----
	Total
	Rs.
<b>Income :</b>	
By sale of kg/litre/bottle of honey @	Rs.
Gross Income	
Less depreciation on hives/processing equipment and building	Rs.
Less interest on capital	Rs.
Tax payable	Rs.
	-----
Net profit—percentage profit/income utilisation	Rs.
	-----

### Handicrafts/cottage industries/self-employment projects :

#### Basic Data :

- a) Number of workers in one unit
- b) Wage rate-pattern of paying—(daily/piece rate)
- c) Quantity of raw material per work/per unit period
- d) Period for which recurring capital calculated.
- e) Cost of raw material/rate per quantity—category-wise
- f) Capacity of workers—in terms of final product—category wise in weight/number
- g) Sale value per article produced
- h) Percentage commission for marketing.

#### Expenditure :

1. Cost of raw material—workers @ Rs. Rs.
2. Wages for workers @ Rs. Rs.

3. Cost of accessories nos : @ Rs.	Rs.
4. Marketing expenses/percentage commission	Rs.
5. Transport and conveyance expenses	Rs.
6. Administration/supervision expenses	Rs.
	-----
	Total Expenditure
	-----

#### Income :

1. By sale of kg./nos. @ Rs.	Rs.
2. By sale of kg/nos. of bi-products @	Rs.
	-----
	Total Income
	-----

#### Gross Income :

Less depreciation on building	Rs.
Less depreciation on machinery/tools/furniture	Rs.
Less trade/administration/supervision	Rs.
Less interest on capital	Rs.
Less tax payable	Rs.
Net profit	Rs.
Percentage profit	
Income/profit utilisation	

#### Training projects : (Liability from their point of view of maintenance)

#### Expenditure :

1. Salary of tutors/foreman @ Rs/month	Rs.
2. Stipend to trainees, if any @ Rs./month	Rs.
3. Value of material used in training kg./ Nos. @ Rs.	Rs.
4. Maintenance/repair of equipment/machinery	Rs.
5. Registration/affiliation and other fees	Rs.
6. Administrative/supervision expenses	Rs.
7. Rent, electricity other facilities, if paid, for the accomodation Rs. per moth	Rs.
	-----

Total Expenditure Rs.

## Income

1. By fees @ Rs. for No. of trainees	Rs.
2. By sale of finished articles kg./nos. @	Rs.
3. By job work/job orders executed	Rs.
	_____

Total Income      Rs.

Excess income over expenditure/excess expenditure over income.

Mention how deficit is planned to be met, if there is an excess expenditure over income.

Make a note on depreciation, interest on capital etc.

## PUBLIC HEALTH PROJECT :

### Hospital/Dispensary (Budget) :

#### Basic Data : (Assumption/Projections)

- Number of out-patients—a projection based on present attendance, if hospital is existing.
- Number of in-patients—a projection based on present attendance, if hospital is existing.
- Number of lab. tests, X-ray—ECG, operations etc.
- Charges for registration/consultation. Bed charges, x-ray charges, lab. charges etc.

Expenditure : (Based on worksheet depending on the number of patients and the rate of service/charges)

1. Cost of medicines/injections for patients (average)	Rs.
2. Salary of staff/wages of menials	Rs.
3. Cost of X-Ray film/developing chemicals	Rs.
4. Cost of chemicals for laboratory	Rs.
5. Electricity/water supply	Rs.
6. Electric Laundry and washing	Rs.
7. Stationary/postage/telephone/telegrams	Rs.
8. Dressings/bandages and other common items	Rs.
9. Furnishings/consumable articles	Rs.

Rs. 110

937

51

937

COMMUNITY HEALTH CELL  
47/1, (First Floor) St. Marks Road,  
Bangalore - 560 001.

10. Transport and conveyance/travel expensis/ vehicle maintenance	Rs.
11. Membership/Journals	Rs.
12. Rent for building, if any paid	Rs.
	-----

Total Expenditure      Rs.

**Income.**

1. Registration/consultation—Nos. @ Rs.	Rs.
2. Value of medicines/injections realised number of patients @	Rs.
3. By laboratory tests Nos. @ Rs.	Rs.
4. By X-Ray/screening Nos. @ Rs.	Rs.
5. Operation charges Nos. @ Rs.	Rs.
6. ECG charges Nos. @ Rs.	Rs.
7. By in-patients bed charges number of patient/day/year @ Rs.	Rs.
8. Delivery fees levied No. @ Rs.	Rs.
9. Ambulance/mobile van charges levied/miles @ Rs./mile	Rs.
	-----

Total Income      Rs.

Mention about the depreciation fund, interest on capital, utilisation of excess income if any etc.

If there is a deficit budget how the deficit is planned to be met.

**Mobile Clinic/Ambulance/Conveyance for Health Works : (Excluding Medicine and Salary)**

**Basic Data :**

1. Average week'y/monthly/yearly mileage
2. Mileage per litre of petrol/diesel
3. Cost of petrol/diesel/Mobile oil per litre
4. Repairs/service/replacements/percentage of capital or lump sum
5. Tax-annual/exemption/if any
6. Insurance—comprehensive/third party/token
7. Salary rate for driver/helper

**Note :**

- a) In the case of mobile clinic, the cost of medicine and salary of staff be added to the expenditure.
- b) In the case of community health work, salary of staff be added.
- c) The charges levied from patients under the programmes (registration/visiting fee) may be shown as income.

**Expenditure : (Annual)**

1. Salary of driver/helper @ Rs./per month	Rs.
2. Cost of—litre of petrol/diesel @ Rs./ltr.	Rs.
3. Cost of—litre of Mobile oil % Rs./litre	Rs.
4. Repairs/service/replacement charges	Rs.
5. Tax (road tax) per year Rs.	Rs.
6. Insurance @ Rs./year	Rs.
Total Expenditure	Rs.

**Income :**

1. Hire charges of Ambulance @ Rs./mile	Rs.
2. Levy on visiting charges/extra percentage on medicine @ Rs./per patient	Rs.
3. Fees levied against MCW Programme	Rs.
4. Excess Income over expenditure or Excess expenditure over income	Rs.
Total Income	Rs.

Provide Note : Plan to meet the deficit if any and depreciation fund, interest on capital etc.

**VI. SELF-HELP/LOCAL CONTRIBUTION**

- a) Indicate the capacity of beneficiary/institution to offer self-help.
- b) Explain the self-help already offered. Is it under-estimated or bolstered up.
- c) Indicate the possibility of local contribution other than self-help of beneficiaries.
- d) Indicate the type of self-help—cash, kind, labour skilled or un-skilled.

- c) Analyse the means and methods, adopted in mobilising self-help eg : saving scheme, cooperative pooling in rotation of labour etc.
- f) If self-help is not already proposed, mention the promotive action initiated to mobilise the same. The response and indication to mobilise self-help, suggestion for evaluation.
- g) Local contribution in the form of Government subsidy, matching grant, equity-participation, aid from Panchayat, Lion's Club, Rotary Club, Pius Associations, local agencies etc. Calculate the percentage of self-help to the capital envisaged for investment.

**7. Loan Capacity, mutual aid, continuity, revolving fund, Channeling of Funds :**

**A. Loan Capacity**

Loan capacity or borrowing capacity of a project may be determined based on :

- a) Productivity and profitability of investment.
- b) Need of the beneficiary to use the additional income for similar developmental programmes.
- c) Need for expansion of the project to other needy members or to other areas for similar purposes.

Hence comment on the loan capacity of a project taking into account :

1. Economic viability
2. Socio-economic status of beneficiaries
3. Local developmental needs
4. Individual beneficiary needs for further development
5. Maintenance/reserve fund/expansion of the project
6. Objectives like supporting of welfare scheme/institutions

**B. Mutual Aid :**

- a) Mention the understanding of the concept of mutual aid. A mere repayment should not be the motivation but a deeper understanding and expression of mutual concern and solidarity with the community, has to be projected as objectives.
- b) Indicate whether there is any built in provision/planning/decision taken to effectively implement the above educative element.

- c) Methodology of operation and the impact envisaged as a result of introducing/or having introduced this concept of mutual co-operation.

#### C. Continuity:

Indicate the possibility of uninterrupted continuity of the project based on :

1. Viability/non-viability/maintenance.
2. Personnel availability.
3. Organisation/structural patterns
4. Educative animation-processes at work to introduce change.
5. Handing over of leadership to local level/decision making machinery etc.

#### D. Revolving fund/Repayment :

- a) Explain the understanding of revolving fund.
- b) Indicate willingness to contribute towards revolving fund.
- c) Describe the awareness of the beneficiaries of the conditions stipulated in paying back to the revolving fund.
- d) Criticism, if any levelled against the revolving fund.
- e) Name the person responsible (competent legally) to sign the agreement of repaying.
- f) Furnish the agreement in writing and indicate collaboration from Superior Authority for accepting loans cum grants for such projects.

#### E. Channelling of Funds :

1. Explain the preference with reference to :
  - a) Direct payment to the project holder/group.
  - b) Payment through religious institutions like Diocese/Parish etc.
  - c) Through registered societies.
  - d) Through public credit institutions like banks.
2. Indicate the willingness to enter into a legal agreement. Mention the competent authority to sign a legal document.
3. Feasibility of entering into agreement with individual beneficiaries/groups. Detail the guarantee system, effectiveness/strength/weakness etc. of the agreements.

4. The possible educative value/procedural implications, advantages/disadvantages of such legal procedures.

#### 8. Beneficiary Patterns :

- a) Mention who are the direct beneficiaries, households and members and indicate their socio-economic standing in relation to the national standards. The marginality (Poverty) of the beneficiary/group/institution to substantiate that the beneficiaries deserve help, need be explained.
- b) Indicate the extent of benefits envisaged as a result of the project—in physical terms as also from the educative point of view.
- c) Explain the long term targets (goal) and the constructive approach envisaged to achieve the same in relation to the socio-cultural and political background of the beneficiaries.
- d) The caste and creed of the beneficiaries, whether the group is heterogenous or homogeneous or how complex/diverse the group is.
- e) Indicate the extent of benefit as a result of the implementation of the project eg : extra production, lowering of prices, increase of wages, better service conditions, etc. Mention the group/beneficiaries who will be benefitted indirectly by the project.
- f) Indication on the proportion of benefit appropriated by the indirect beneficiaries and how this compares with the benefits which are supposed to accrue to the direct beneficiaries.
- g) Any safety measures proposed or the actual danger of the indirect beneficiary dominating the project and eliminating the beneficiary group from the project or making it not helpful to the intended group.
- h) Indicate the danger of intermediary group/animators/ sponsors etc, syphoning of the benefits intended for the beneficiary group.
- i) The overall attitude of the beneficiary to the project/project holder and of themselves.
- j) The overall impressions of the local people about the group.
- k) Attitude of Government and public bodies towards the beneficiary group.

#### 9. Supervision :

- a) Mention the body responsible for supervision. Comment on the constitution, organisation, conduct and image of the body.

- b) Give a short account of the project holder/structure, the experience/success/failure/etc. in similar undertaking.
- c) Indicate the technical and administrative personnel available—Name them with their qualification/experience. Verify the documents which will support the qualification/experience etc. If full time qualified personnel are not available, how the efficient supervision can be organised.
- d) In case of collaborative effort for supervision, especially for technical know how/consultancy etc. the practicability, ready availability etc. may be mentioned.
- e) Make a special mention of the accountability/maintenance of accounts/records/reporting/etc. of the project holder/institution from past performance, a self-evaluation.
- f) The existing public relations with the group and others in the area.

#### **10. Government/Voluntary Agency Collaboration :**

- a) Mention whether any type of collaboration exist or envisaged). If so comment on the extent and in what forms namely funding, subsidy, matching grant, maintenance expenses, technical know-how, consultancy services, recognition etc.
- b) In case not existing/not envisaged, the reasons namely lack of awareness of such possibilities, unwillingness due to various built in constraints, etc.
- c) The project holder/sponsor could probe the possibilities of collaboration with Government/Panchayat/Block Development/Lion's Club/Rotary Club/Pius Association/Local Animated Groups/Ecumenical Groups etc. for collaboration.
- d) Indicate the receptiveness to integrate the programme with others and work supplementing and complimenting the efforts of others, public or private.
- e) Assess from Government/Voluntary Agency and explain their attitude towards the programme/project holder/beneficiaries—their appreciation/hostility etc. of such activities.

#### **11. Cost Analysis :**

- a) Furnish the estimate/quotations supporting cost plan.
- b) The reliability/authenticity of the estimate plan/quotations may be explained quoting the source and personnel involved.

- c) While explaining the reasonableness of the cost, check on the factors influencing—namely inflation, transport cost, style and nature of investment, remoteness of place, overhead expenses etc.
- d) Compare the rates quoted with the Government/PWD rates.
- e) Mention the commission/supervision charges etc. and whether they are within accepted limits.
- f) The need of adding up a percentage for inflation and other contingencies be studied.

## 12. Other Appeals/Aid Received :

- a) Mention, whether any other agency is approached for aid.
- b) Enclose with the report, copy of relevant appeals submitted to other agencies.
- c) Describe the contacts developed and how influential it is from the point of view of sanction of the project.
- d) Details of aid received for the proposal earlier and an evaluation of the progress already achieved. Reasons for not tapping the same source, if the present aid is solicited from another source.
- e) Willingness/acceptability of conditions stipulated by agencies for funds channelled through them in case of direct applications to agencies abroad.
- f) **Recommendation/Observation/Comments:**
  - a) Furnish any and all additional informations not contained/solicited in the above pages.
  - b) Highlight the positive and negative aspects of the project as a conclusion.

## CHAPTER III

# Evaluation of Funded Projects

### 1. Proforma

- a) Introduction
- b) Basic data
- c) Achievement of physical targets
- d) Utilisation of benefits
- e) Organisational achievements
- f) Educative value
- g) Technical aspects
- h) Economics
- i) Procedural accuracy
- j) Accounting procedure
- k) Revision and substantiation
- l) Costs
- m) Supervision
- n) Public relations
- o) Observation/conclusion

#### Introduction

##### A. Purpose of Evaluation :

The post funded evaluation of a project after granting of funds is to assess whether :

1. The objectives outlined in the original application have been achieved or not.

2. The physical targets of implementation have been accomplished or not.
3. The assumptions made at the time of planning as to :
  - a) the organisational involvement of people;
  - b) the economics of investment;
  - c) the technical feasibility
  - d) the management;
  - e) the cost factors estimated;
  - f) collaboration with others envisaged;
  - g) self-help and repaying capacity etc. are proved.
4. To judge the success or failure of the project.

#### **B. Method of Evaluation :**

The evaluation is to be conducted by on-the-spot study, physical verification/perusal of records/accounts/and through interviews with project holders and beneficiaries and by comparing data previous and present as well as rating the growth factor by measuring the change of attitude of people.

#### **C. Approach :**

Unlike an on-the-spot study, the evaluation of a project is not likely to be relished or fully welcomed by the project holders and beneficiaries as it involves, checking the implementation, accounts, records, verifying the data furnished by the project holder etc. as also to assess the progress of the project. It is necessary for the evaluator to be positive and be a constructive critic with a helpful attitude so that one is not misunderstood. At the same time it is necessary to bring out all facts and data in a subtle way so that the actual progress and growth can be gauged, as also the bottle necks and problems are unearthed. It is not advantageous to be over suspicious while evaluating a project but would need to exercise responsibility in probing through the matters, properly.

#### **D. NOTE :**

Inspite of various communications, written and oral, it is possible that the project holder has not understood the requirement of an agency. It is quite necessary that during the implementation stage and even later, advise and suggestions may have to be given in keeping of accounts, maintenance of records, organisation of the beneficiaries, involvement of beneficiaries for decision making etc. as most of the project holders are not fully aware of the logistics of the above processes and procedures. It is useful to be aware of the

possibilities of aid from Banks, local credit institutions, Government etc. and from local voluntary agencies like Rotary Club, Lion's Club etc.

## Text

### Basic Data :

A. Title of Project	—
Ref.	—
Applicant	—
Amount Sanctioned	— Received—

### B. Documents :

1. Abstract of accounts
2. Copy of records, if relevant
3. Vouchers/receipts
4. Comparative data on change/progress/growth.

### C. Report :

#### 1. Achievement of physical targets :

a) Indicate what have been achieved against what have been proposed for implementation as specified in the project proposal.

EG : Irrigation Project :

Details	Proposal	Achievement
Well	40 x 15' dia	38' x or 42' x 16'
Pump	5 HP Elec/ordinary	3 HP Deep well

b) Realisation of the objectives in terms of results (quantities) which were proposed to be achieved.

Details	Proposal	Achievement
Irrigation	3 Acres	2.5 acres
Crops	2 "	1 or 3
Food	8 tons	6/7 tons
Employment	10 people	7 people etc

c) Comment on the implementation and results achieved etc. to assess the percentage of success of making assumptions in the planning and study of the project.

## 2. Utilisation of benefits :

- a) Gauge the benefits obtained out of the realisation of the project. Mention them in detail.
- b) Indicate the utilisation of benefits derived.
  - 1. to meet day to day needs of the beneficiary/institution/group.
  - 2. to achieve long term benefits like education, housing, acquiring of essential amenities or articles of lasting values.
- c) Explain effect of utilisation of benefits and the positive as well as negative aspects of the same.
- d) Indicate the awareness achieved by the beneficiaries in the above aspect (understanding, willingness etc.)
- e) Mention any suggestion/direction/stipulation given to help achieve the proper utilisation of benefits.

## 3. Organisational Achievements :

- a) Mention the progress achieved by the structure if it was created during the planning stage.
- b) Indicate the progress achieved by the structure, if it had come into existence after the sanction of the project.
- c) Rate the involvement of people in decision making. The programme in which they are involved etc. The concrete life situations lived through the project, may be given.
- d) Indicate the lack of involvement, malfunctioning of the structure created or evolved during planning, behavioural pattern of beneficiaries on receipt of aid, attitude of beneficiaries towards the project sponsor vis-a-vis the project administration and participation of people.
- e) Mention the achievement in organising the group from the point of view of :
  - 1. Meaningful decision making;
  - 2. Developing collaborative efforts;
  - 3. Identification as a social group;
  - 4. Obtaining public services; as rights.
  - 5. Eligibility for subsidies, concessions, inclusion in local schemes and programmes etc.

## 4. Educative Value :

- a) Enumerate the educative values imparted/imbibed by the group/individual/project holder, as a result of the implementation of the project.

- b) The impact made in the locality/area as a result of the project through modelling—through demonstration in the introduction of new ways, improved materials, modern methods, scientific practices etc.
- c) Action programmes initiated like thrift schemes, credit schemes and the progress achieved through them in shaping values, changing attitudes, developing approaches, improving knowledge etc. should be detailed.

#### 5. Technical Aspects :

- a) A comparative account of the assumptions made during the planning stages of the project and the actual performance during implementation may be given.

**EG :** Data proving assumptions made on availability of water for irrigation, drinking water, availability of raw materials for production, market for produce, services from Government/Voluntary Agencies, patronage of customers, suitability of machinery/tools/implements/equipment for the purpose for which it was acquired, availability of jobs, job work facility etc.

- b) Indicate the efficiency achieved in implementing the project from the technical point of view and establish how far the feasibility of the project is proved or not.
- c) Indicate the problems cropped up during implementation and assess whether they have been avoided or contained or not. Are they beyond the scope of the managerial and administrative capacity of the sponsor.

**EG :** Inflation, recession, natural calamity, group rivalry, involvement of people etc.

#### 6. Economics :

- a) Assess the performance of the project from the point of view of:
  1. Recovery of capital for repayment;
  2. Meeting the day to day need of beneficiaries;
  3. Ensuring continuity by generating income for maintenance.
  4. Expansion to meet additional needs, extension of the scheme to more beneficiaries or to the same group for other needs.
- b) Indicate the pressures suffered by the project due to
  1. Poor technical feasibility
  2. Open market competition;
  3. Marginality of viability (economics of scale);

4. Socio-economic condition of the beneficiaries and the depletion of capital through poor rotation of capital;
5. Diversion of funds to other projects/areas;
6. Market fluctuations/inflation/recession etc.
7. Government regulations/restrictions;
8. Factors beyond the control of the project, like natural calamity, accident etc.

## 7. Procedural Accuracy :

- a) Indicate whether the project holder was maintaining the records namely files, record of events, cash books, minutes of meetings, resolutions, survey data etc.
- b) Indicate regularity in report writing, understanding about the need for report writing, knowledge in report writing.
- c) Practical problems faced in not being able to make reports.

### EG :

1. Project Holder too busy
2. Poor expression and poor writing capacity although good in execution.
3. Sudden transfer
4. Lack of interest of successor
5. Poor progress etc.

## 8. Accounting Procedure :

- a) Indicate whether a separate account is maintained for the project by the project holder and whether it is up to date.
- b) Availability of vouchers and receipts supporting the various expenditures.
- c) Whether accounts are audited. Mention the reaction if the accounts are insisted to be audited by a public Auditor. The efforts to get the project account audited may be judged taking into consideration, the size of the project.
- d) In case where project accounts are mixed up with accounts of other institutions can the expenditure incurred on the project be identifiable. Indicate whether such accounts as above are audited or not.
- e) In cases of lapses in keeping proper accounts supported by vouchers, what explanations are offered and to what extent those statements can be given weightage ?

- f) How far transfers of project holders affected the accounting ?
- g) Was there any misappropriation ? Was it detected ? What measures taken to remedy the same ? How far it has affected the project ?

#### 9. Revision if any and substantiation:

- a) Mention whether there was any revision of project during implementation and whether it has affected the project.
- b) Indicate the extent of deviation/revision and whether the same had permission or ratification.
- c) Point out whether the revision can be substantiated and mention those valid reasons offered to substantiate the revision and reasons for not obtaining earlier permission etc.
- d) Assess how far the revision/deviation has affected/defeated the main objective of the project and what remedial measures are taken or suggested.

#### 10. Costs :

- a) Indicate whether there was any actual cost difference.
- b) If so whether it was marginal or extra ordinary.
- c) Mention reasons for cost difference namely.
  1. Revision
  2. Delay in sanction
  3. Inflation
  4. Delay in implementation
  5. Lack of availability of raw material
  6. Poor mobilisation of local resources
  7. Subsidies/grants not received from other sources.

#### 11. Supervision :

1. Indicate the efficiency of the administration, Management in general.
2. Technical supervision for implementation, marketing etc. Personnel availability, consultancy services etc. availed off.
3. Indicate the role played and the management capacity of the project sponsor

4. Local committee, their impact and feasibility.

**12. Public Relations :**

Comment on :

- a) Relations between project implementor and the beneficiaries.
- b) Relations between members of the (beneficiary) group.
- c) Relation between the beneficiary group and people outside.
- d) Relation between project and Government/local bodies.
- e) Relation between project group/project holder and the superior/authorities.
- f) The overall image of the project, the project holder and the beneficiary group.

**D. Conclusion.**

1. Add any other information gathered/obtained outside the above headings.
2. Infer whether the project is a success, failure, partial success etc.
3. Indicate the possibility of salvaging the project, if it is judged as not functioning well.
4. Offer suggestions to make the project more successful so as to bring more benefits to the beneficiaries and the area.

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# CARITAS INDIA

Caritas India was established by a mandate of the Catholic Bishops' Conference of India in the year 1962. Its main objectives are:

True to its name, in a spirit of Christian love (Caritas means love in its total Christian sense), CARITAS aims at the integral development of all persons, irrespective of race, caste or creed so that they may individually and collectively reach the fullness of growth to which God has destined human persons and communities. Hence, the objects of CARITAS shall specifically include the following :

- (i) To educate people and make them conscious and concerned about self-reliance, social justice and co-operation, so that they may be prepared and equipped to work out for themselves and for others a future in keeping with their own human dignity and destiny.
- (ii) To launch sustained campaigns for the relief of people affected by disasters like famine, drought, floods, hurricanes, earthquakes, pestilence, epidemics, wars etc., so that Christian charity may bring solace and effective assistance to the suffering people.
- (iii) To help devise schemes and projects and help to execute them which will assist the country towards elimination of poverty and misery.
- (iv) To promote all types of activities that are aimed at the integral development of persons and communities; particularly, to help in setting up equitable credit and marketing structures, improved facilities and methods of farming, irrigation, animal husbandry, technical institutions and cottage or small-scale industries; these; are to be encouraged to be done, wherever possible on a co-operative basis.
- (v) To co-ordinate the charitable work of the various Catholic social welfare and charitable agencies, without infringing upon their autonomy.
- (vi) To channelize the energies of our people towards constructive national work in the social, educational and cultural fields, in co-operation with Government, whenever feasible.
- (vii) To collaborate and co-operate with Governmental and Voluntary agencies, national and/or international whose objectives are in accordance with the aims of CARITAS INDIA and to launch campaigns to collect in cash or in kind, assistance for the above-said objects.